

CHARACTERISTICS OF TRAVELERS FROM TAIWAN TO CALIFORNIA - 2009

Taiwan was one of California's top ten overseas markets with approximately 143,000 visitors to California in 2009. Collectively visitors from Taiwan spent approximately \$217 million in California.

Taiwanese visitors to California during 2009 reported spending \$114 per day during a 13.3 night average stay or approximately \$1,516 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

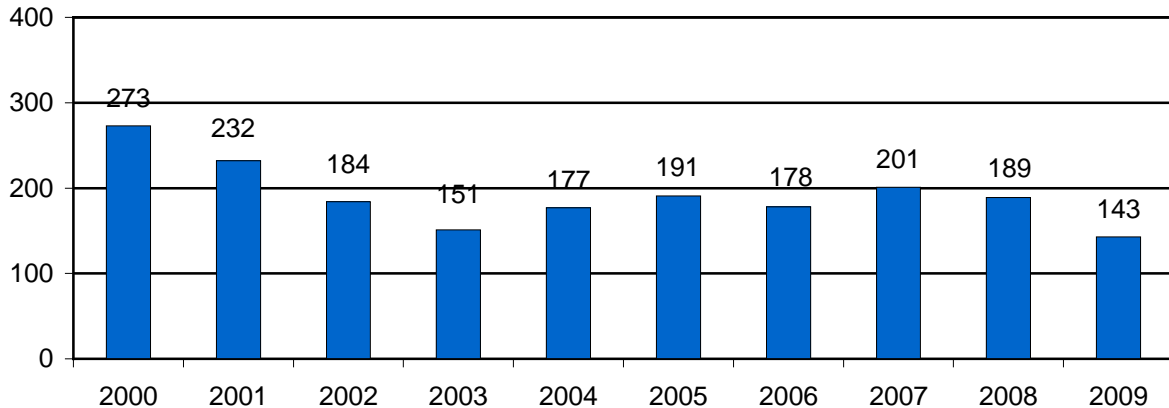
Visitors From Taiwan

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1999	453,299	60.0%	272,000
2000	457,302	59.6%	273,000
2001	357,064	65.0%	232,000
2002	288,032	63.9%	184,000
2003	238,999	63.3%	151,000
2004	297,684	59.6%	177,000
2005	318,886	59.8%	191,000
2006	300,382	59.2%	178,000
2007	311,020	64.5%	201,000
2008	294,893	64.2%	189,000
2009	239,545	59.7%	143,000

1) U.S. Dept of Homeland Security, Form I-94, Non-Resident Arrival Records.

2) U.S. Dept of Commerce, Office of Travel & Tourism Industries, "Survey of International Air Travelers."

Number of Visitors from Taiwan to CA, 2000-2009 (in 000s)



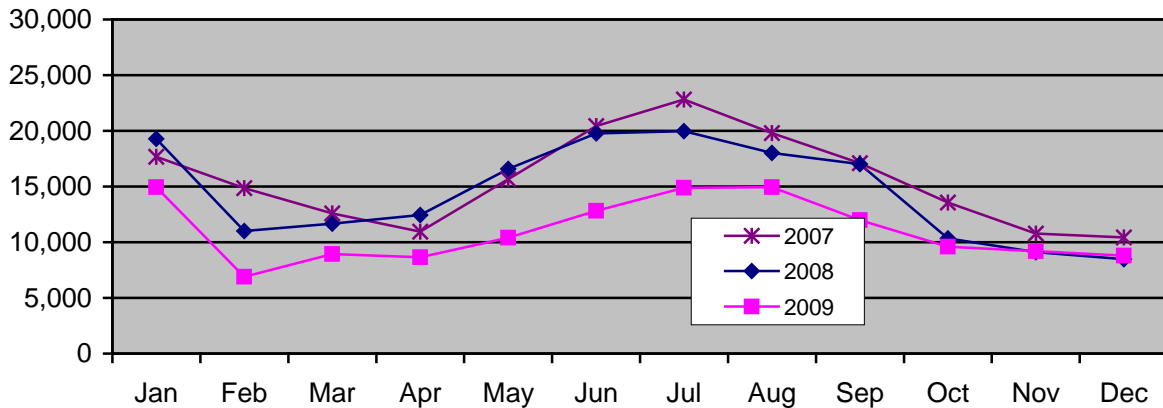
Source: International Trade Administration, Office of Travel and Tourism Industries.

The volume of visitors from Taiwan to California rose during the 1990s until its peak of 289,000 in 1997. Visitation pulled back a little from this peak in three subsequent years (1998, 1999, and 2000) and after the 9-11 terrorist attacks bottomed at 151,000 visitors in 2003. Since then, visitor volume has risen and fallen but fell to a new low of 143,000 in 2009.

Taiwanese Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Taiwan to California were lower in 2009 compared with 2007 and 2008. In general, Taiwanese resident arrivals at California ports-of-entry have recorded seasonal peaks in January and in the summer months. The lowest volumes were recorded in February, April, and December.

**Residents of Taiwan
Monthly Port of Entry Arrivals to CA
2007-2009**



U.S. Department of Homeland Security, I-94 Form; CIC Research, Inc.

Comparisons with Overseas Visitors

Detailed trip and traveler characteristics of visitors from Taiwan are provided in the following table. The table also includes trip and traveler characteristics of all overseas visitors to California for comparative purposes.

Compared to all overseas visitors to California, travelers from Taiwan are more likely to:

- Travel to California to visit friends or relatives or for business/professional purposes
- Have decidedly lower trip planning and advance airline booking horizons
- Plan and book their air trip through a travel agent
- Mention safety reputation as a main factor in selecting an airline
- Travel with business associates
- Travel in executive or business class
- Stay in a private home
- Use a company or private auto for transportation while in the U.S.
- Spend a lower percentage of their travel dollar on lodging
- Have a lower average household income

Conversely, visitors from Taiwan are less likely to:

- Travel to California for leisure/recreation/holiday purposes
- Use a personal computer to plan or book their trip
- Mention airfare as a main factor in selecting an airline
- Travel in economy/tourist/coach class
- Travel with a spouse
- Stay in hotels and other forms of paid lodging
- Be on their first trip to the U.S.
- Visit San Francisco, Las Vegas and New York City
- Experience activities such as sightseeing in cities, visiting historical places, small towns, national parks, the countryside, and cultural heritage sites
- Use a taxi/limousine, airlines, or public transportation in the U.S.

Characteristics of Travelers from Taiwan to California, 2009

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Taiwan (n = 727)	Leisure Visitors from Taiwan (n = 303)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	47%	20%	43%
Business/Professional	22%	39%	-
Visit Friends/Relatives	21%	27%	57%
Convention/Conference	6%	8%	-
Other Purpose	5%	5%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	65%	46%	68%
Visit Friends/Relatives	37%	48%	73%
Business/Professional	26%	43%	6%
Convention/Conference	8%	14%	2%
Sources Used to Plan Trip**			
Airlines Directly	23%	25%	28%
Corporate Travel Department	8%	8%	1%
Personal Computer	43%	28%	31%
Friends/Relatives	18%	16%	21%
Newspapers/Magazines	3%	2%	2%
State/City Travel Office	4%	-	1%
Tour Company	7%	6%	5%
Travel Agency	40%	55%	54%
Travel Guides	10%	5%	7%
Advance Planning for Trip			
7 days or less	7%	13%	7%
8 - 30 days	28%	53%	52%
31 - 60 days	19%	20%	22%
61 - 90 days	12%	7%	8%
More than 3 Months	34%	7%	11%
Total	100%	100%	100%
Average Planning Time in Days	100 days	42 days	49 days
Advance Airline Reservations			
7 days or less	13%	28%	18%
8 - 30 days	38%	57%	62%
31 - 60 days	16%	11%	14%
61 - 90 days	10%	3%	3%
91 - 120 days	6%	1%	2%
121 - 180 days	10%	1%	-
6 Months or More	7%	-	1%
Total	100%	100%	100%
Average Booking in Days	67 days	25 days	30 days

* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.

** Multiple response question. Table may add to more than 100%.

Sources: International Trade Administration Office of Travel and Tourism Industries
"Survey of International Air Travelers."

**Characteristics of Travelers from Taiwan to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Taiwan (n = 727)	Leisure Visitors from Taiwan (n = 303)
Means of Booking Air Trip			
Airlines Directly	13%	9%	14%
Corporate Travel Department	9%	11%	3%
Personal Computer	25%	7%	9%
Travel Agent	46%	66%	64%
Travel Club	1%	1%	1%
Tour Operator	5%	6%	8%
Other/Don't Know	2%	1%	2%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	32%	14%	18%
Schedule	13%	11%	8%
Non-Stop Flight	12%	21%	26%
Mileage Bonus/Frequent Flyer Program	10%	12%	9%
Previous Good Experience	9%	7%	7%
Safety Reputation	6%	16%	15%
Airline Loyalty	4%	4%	5%
In-flight Service	5%	8%	9%
Employer policy	3%	6%	1%
Other	6%	1%	2%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	81%	62%	70%
Executive/Business	17%	35%	27%
First Class	2%	3%	4%
Total	100%	100%	100%
Use of Package			
Yes	14%	14%	19%
No	86%	86%	81%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	16%	16%
8 - 30 days	24%	69%	70%
31 - 60 days	13%	10%	10%
61 - 90 days	13%	3%	2%
91 - 120 days	8%	1%	2%
121 - 180 days	18%	-	-
6 Months or More	20%	2%	-
Total	100%	100%	100%

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**Characteristics of Travelers from Taiwan to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Taiwan (n = 727)	Leisure Visitors from Taiwan (n = 303)
Travel Companions**			
Business Associates	8%	19%	2%
Family/Relatives	25%	24%	45%
Friends	11%	8%	9%
Spouse	28%	16%	27%
Tour Group	2%	1%	1%
Traveling Alone	38%	42%	34%
Average Travel Party Size	1.6	1.5	1.7
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	76%	61%	46%
Private Home	30%	45%	63%
Other	4%	2%	1%
Length of Stay			
Mean Nights in the U.S.	22.4 nights	21.0 nights	18.2 nights
Mean Nights in California	11.7 nights	13.3 nights	13.0 nights
% of California Nights	52%	63%	71%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	15%	17%
Average Trips to the U.S. in Past Year	1.7 trips	2.3 trips	1.6 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	7.5 trips	5.1 trips
Average Number of States Visited	2.1 states	1.6 states	1.4 states
Average Number of Destinations Visited	3.0 dest.	1.9 dest.	1.8 dest.
Places Visited in the U.S.**			
Los Angeles	55%	56%	64%
San Francisco	48%	35%	34%
Las Vegas	30%	11%	17%
New York City	18%	5%	2%
San Diego	13%	7%	4%
Anaheim-Santa Ana	7%	7%	8%
Grand Canyon	7%	1%	2%
San Jose	6%	11%	5%
Yosemite	4%	1%	2%
Chicago	4%	5%	2%
DC Metro Area	4%	2%	-
Monterey-Salinas	4%	-	1%
Riverside/San Bernardino	4%	1%	1%
Seattle	3%	4%	5%
Sacramento	3%	2%	2%
Santa Barbara	3%	-	-
Oakland	2%	1%	1%

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Activities Experienced While in the U.S.**			
Shopping	87%	88%	92%
Dining Out	86%	78%	81%
Sightseeing in Cities	56%	45%	58%
Historical Places	45%	25%	33%
National Parks	39%	21%	29%
Amusement/Theme Parks	39%	32%	47%
Visiting Small Towns	38%	16%	20%
Cultural Heritage Sites	32%	13%	17%
Touring Countryside	31%	11%	13%
Casinos/Gambling	27%	24%	35%
Art Gallery/Museum	26%	13%	16%
Guided Tours	24%	18%	24%
Transportation While in the U.S.**			
Airlines in U.S.	39%	33%	22%
Taxi/Limousine	39%	27%	18%
Rented Auto	38%	33%	30%
Company or Private Auto	29%	42%	53%
City Subway/Tram/Bus	26%	19%	19%
Railroad between Cities	11%	6%	8%
Bus between Cities	10%	9%	14%
Motor Home/Camper	2%	3%	5%
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,584	\$3,607	\$4,146
Per Visitor/Trip (U.S.)	\$2,308	\$2,403	\$2,481
Per Visitor Per Day	\$103	\$114	\$136
Per Visitor/Trip (California)	\$1,205	\$1,516	\$1,768
Spending by Category (Per Visitor/Trip)			
Lodging	\$660	\$497	\$300
Food/Beverages	\$463	\$445	\$502
Gifts/Souvenirs	\$395	\$497	\$564
Transportation in the U.S.	\$348	\$368	\$285
Entertainment	\$234	\$266	\$416
Expenses at the Airport	\$34	\$40	\$35
Other	\$174	\$291	\$379
Total Spending Per Visitor/Trip	\$2,308	\$2,403	\$2,481

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Payment Method for Trip Expenses			
Credit Cards	50%	46%	38%
Cash	41%	46%	52%
Debit Cards	7%	2%	2%
Travelers Checks	2%	6%	8%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	41 years	42 years
Average Age - Females	39 years	39 years	41 years
Occupation			
Professional/Technical	35%	39%	34%
Manager/Executive	28%	30%	21%
Student	10%	8%	8%
Retired	8%	5%	9%
Clerical/Sales	7%	5%	6%
Other	13%	13%	23%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	9%	10%	10%
\$20,000 - \$39,999	14%	17%	21%
\$40,000 - \$59,999	14%	20%	23%
\$60,000 - \$79,999	13%	16%	13%
\$80,000 - \$99,999	11%	10%	10%
\$100,000 - \$119,999	9%	7%	7%
\$120,000 - \$139,999	6%	3%	2%
\$140,000 - \$159,999	5%	3%	2%
\$160,000 - \$179,999	3%	2%	4%
\$180,000 - \$199,999	3%	1%	1%
\$200,000 and over	12%	11%	9%
Total	100%	100%	100%
Average Annual Income	\$94,800	\$82,500	\$75,100

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